

Use and Creation of Student Custom Fields

Contents

| | |
|---|---|
| Introduction | 1 |
| Student custom fields are used for one of three purposes: | 1 |
| Note on Custom Field Categories: | 2 |
| Creating Custom Fields | 2 |
| Go to Setup > Configure Lists > Custom Fields > Custom Fields. Click “Add Item” | 2 |
| Custom Field | 2 |
| Category | 3 |
| Data Type | 3 |
| Default Value..... | 3 |
| Option Values..... | 4 |
| Rollover to new terms..... | 4 |
| During save, DO NOT update saved attribute values to default..... | 4 |

Introduction

Student custom fields are used for one of three purposes

- 1. Student data from SIS:** Custom fields can house information about students coming from your Student Information System (SIS), such as Banner, PeopleSoft, Colleague, Jenzabar, Cams, etc.
 - a. A custom field is used when there is not already a built-in field for the information to go into – or – when you want to capture that particular piece of data per term.
 - b. The Students > General tab will always show the student’s current information regardless of which term you are looking at. If you want to look back at Fall 2012 and know a student’s age or class status at that time, then you might want to have those data elements mapped to both a built-in field under Students > General as well as into a custom field.
- 2. Housing Application Questions – Personal Info:** Another common use of student custom fields is for any question you want to ask a student on a housing application.
 - a. This does not include Living Requests (which are hall, floor, room, bed based information, not student based information) or Addresses/Contacts, because each of these is handled separately.
 - i. Why not ask a student living requests as a personal info question? You could ask a student where they want to live under a Personal Info question, but that information is not associated with any hall, floor, room, or bed. If you are going to assign the students individually and look at their requests, or run AutoAssign by reports on the student preferences (one at a time), you could utilize these answers; however, the way AutoAssign is designed to run is using the Living Requests feature where the answers/values the student provides are actually associated with a hall, floor, room, or bed, and thus AutoAssign can take into account multiple preferences and look at actual availability to make a good assignment.
 - b. Personal Info questions can be information you just want to gather for office use such as personal email or cell phone number which your SIS may not collect

- i. If a custom field is being populated from your SIS (as in #1), you should not use these fields on your application because any answer a student provides will be overridden when the data is next imported.
- c. Personal Info questions can also be used for roommate matching (ie, late night/early riser, messy/neat, smoker, etc) during AutoAssign
 - i. Even if your students are all selecting their own rooms online, it can be nice to have the information in the event you need to make room changes later on.
3. **Office Use:** The third typical use of student custom fields is any internal office use, such as tracking when a student turned in an appeal to live off campus, reason for request, outcome/decision, etc.

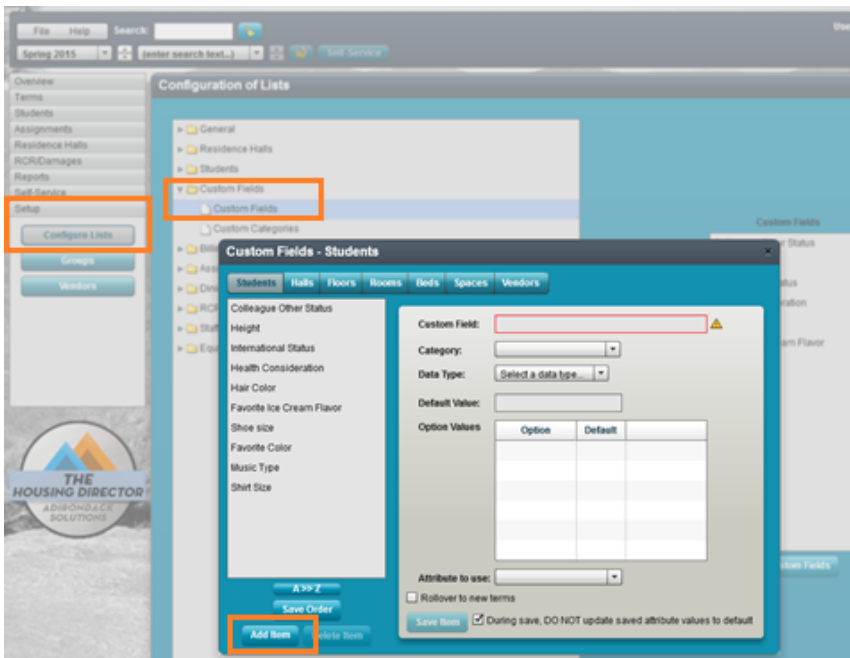
Note on Custom Field Categories

Custom Field Categories are created under Setup > Configure Lists > Custom Fields > Custom Field Categories. Categories serve two purposes:

1. **Security:** control which user groups can view which categories of information. User group permissions are controlled under File > Administer > Manage User Groups and Privileges > Limiting Options > Limit Categories > Custom Categories.
2. **Organization:** group the custom fields together logically so they are easier to reference or edit.

Creating Custom Fields

Go to Setup > Configure Lists > Custom Fields > Custom Fields. Click “Add Item”.



Custom Field: Name the Custom Field.

- SIS: If the custom field will be used to contain information imported from your SIS, it does not have to be the same name as the field coming from your SIS. However, if it isn't, then the housing staff needs to relay the name they used to the IT staff so IT can map the field from your SIS to THD appropriately.
- Application: If you are using this field for an Application Personal Info question, keep in mind this is only the name of the field that contains the data – you are not writing the question here. Under your application setup, you will select the field you created then you will write the question as part of your application.

Category: Select a Category. See “Categories” in Introduction for more details.

Data Type: Select the type of data this field will hold.

- **Yes/No:** This field always has a value – either Yes or No.
 - **SIS:** If the information is coming from your SIS, your SIS data must be in the format -1 (minus one) for yes, or 0 (zero) for no.
 - **Application:** If you are using this field on an application, keep in mind you cannot really enforce a Yes/No field as a required question. You can set it as required, and it will show the red asterisk next to it, but you cannot force the student to make a selection because a Yes/No field is always answered. If you want to have a required yes/no question, consider making a List of Choices question where the options are Yes and No. The student will have to change the answer from N/A or None to the Yes or No option.
- **Text:** General text field – up to 50 characters.
- **Number:** Number field, true numeric values only. For example, a phone number formatted 555-555-5555 needs to be Text, not a number.
- **Date:** A true date value, formatted MM/DD/YYYY or a similar format.
 - **SIS:** Cannot be imported as an oracle format.
- **List of Choices:** A preset list of values which the user will define.
 - **SIS:** If the data is coming from your SIS, the “option values” must exactly match the possible values coming from your SIS.
 - **Application:** If you are using this on an application, these are the values the student will see and select from.
- **Multiple Choice** (not pictured): This is mostly used to collect personal info from a student on an application where you want to allow the student more than one option per question, such as Music or Hobbies.

Default Value: Rarely used, but if you want everyone in THD to have a particular default value for this field until the value is changed to something else, please enter here.

Option Values: If the field is a data type “List of choices”, click “Add Option” for as many values as are appropriate and replace the default text (option 1, option 2...) with the appropriate values.

Rollover to new terms: If you want the student’s data or student’s answer to this question to “follow” the student into future terms, check this box.

- **SIS:** Generally speaking, if the information is coming from your SIS, you don’t want to check this box because new information would populate each term that the student continues to be active. It depends on the type of data it is and how you would use it.

During save, DO NOT update saved attribute values to default: Usually, you will leave this checked. When you are creating a new field, it isn’t relevant whether or not this is checked because there are no saved values and all students will start off with the default. In the future, if you were editing this field, you *usually* don’t want all current values reset to the default value.